CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT

INTRODUCTION

Overview:

A visa slot management project is a system that is used to track and manage the availability of visa slots, which are appointments that are required for certain visa applications. It might be used by a government agency or a visa processing center to schedule and manage appointments with applicants.

Purpose:

Saving the time of the customers who want to book it by using CRM application of booking a Visa slot. Wandering for booking the Visa slot and

tracking can be reduced here. Reduce the paper filling as much the customer expecting. Ensuring the safety of the customers and panic of many verifications.
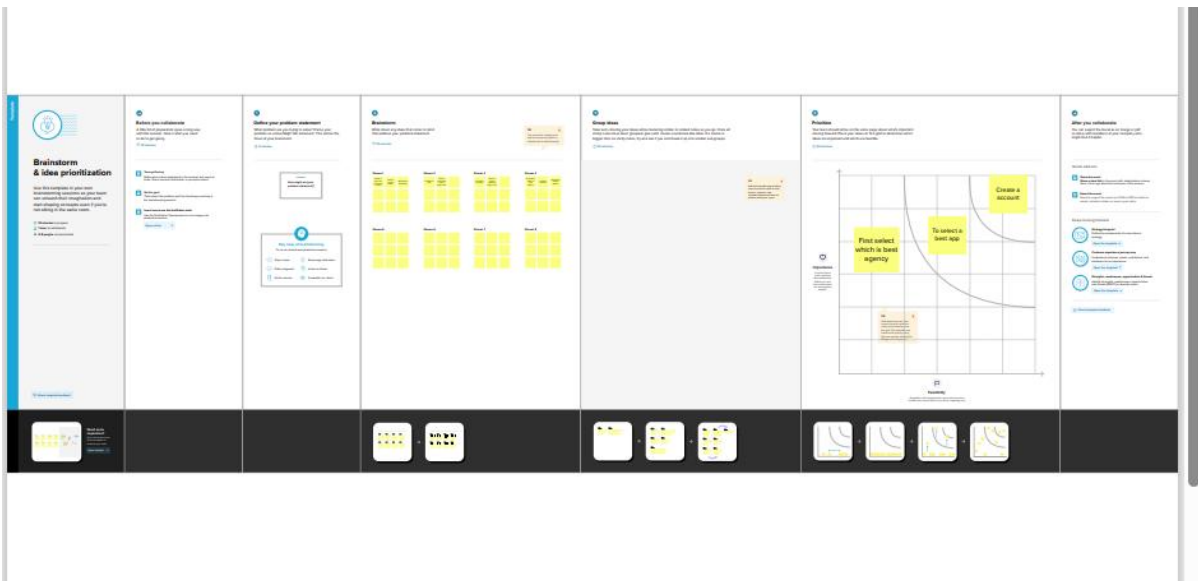
PROBLEM DEFINITION AND DESIGN THINKING:

Empathy map:

Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.
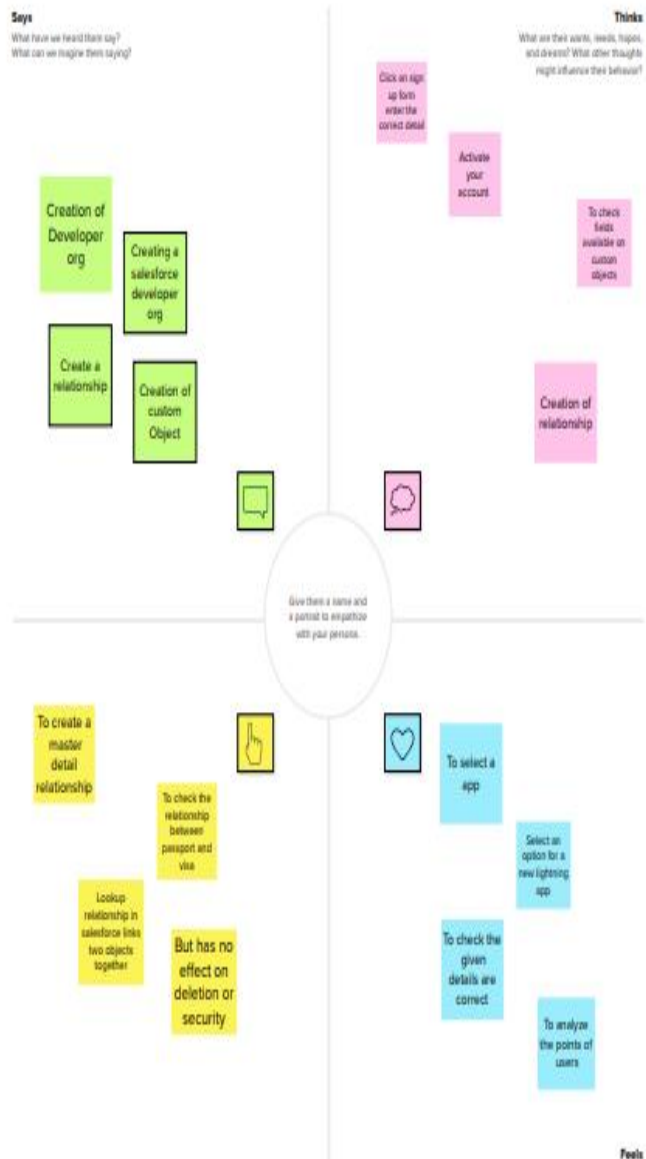
Ideation and Brainstorming map:

Brainstorm

Write down any ideas that come to mind that address your problem statement.

🕐 10 minutes

Person 1

Select a best visa processing center	Given a correct details	Manage the availability

Person 2

Creation of user	Select a government agency apply a visa	

Person 3

To select a best app	Given a correct details to apply a visa	

Person 4

First select which is best agency	Create a account	Checks the custom objects

Person 5

Person 6

Person 7

Person 8
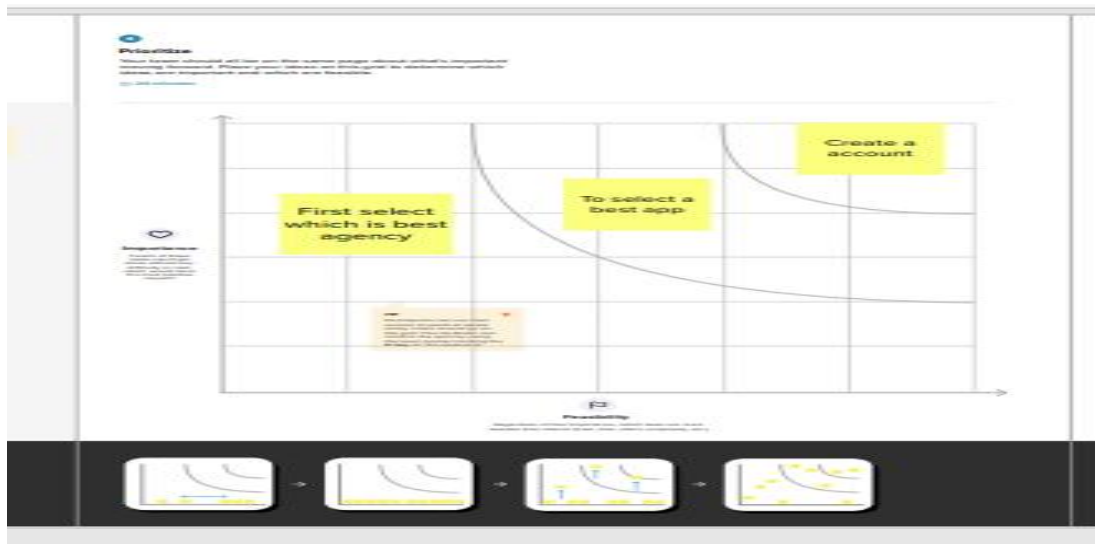
ACTIVITY AND SCREENSHOTS

1.Creation of Salesforce platform:

Go to Developer.salesforce.com and click on sign up. Enter our Detail as name, Email, Role, Company etc., Email is sent your mail id.
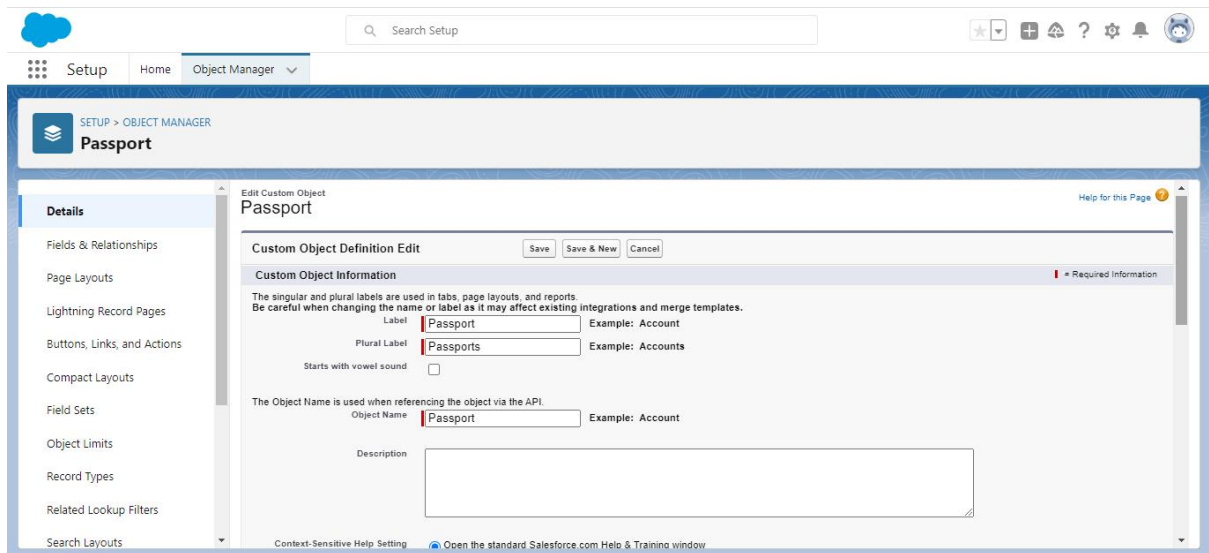
Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account.
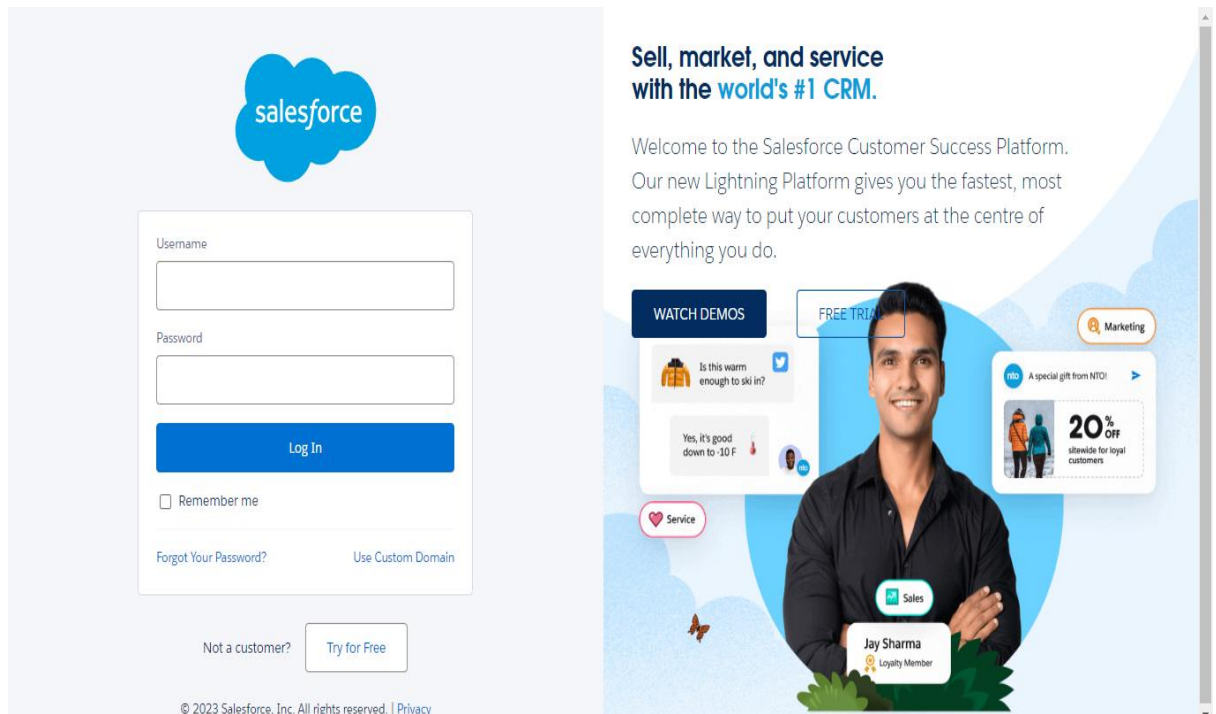
2. Creation of custom object:

Passport:

Navigate to setup to select object manager and create the object gives the detail like label name has passport and enter the plural name, record name, data type, etc., and save it.

Objects involved in Book a visa are Visa slot, Payment, Reschedule/Cancel create in this type.

Visa slot:

Payment:

Reschedule:

Creation of Field on Custom object: Passport

Select our Object from the selection has Passport and select option field and Relationship. Select our data type has number and go to the next page and enter the field label has Contact Number and length should be 10 at the bottom of the object you can find options like required, unique, external id select required option so that always require a value in this field in order to save. Go to next page click on visible checkbox so that it is visible to all profiles and select the next option and save it. The passport field are created like this type.

Contact number:

Setup   Home   Object Manager ∨

SETUP > OBJECT MANAGER
Passport

Details	Edit Passport Custom Field
Fields & Relationships	Contact number
Page Layouts	
Lightning Record Pages	**Custom Field Definition Edit**
Buttons, Links, and Actions	**Field Information**
Compact Layouts	
Field Sets	
Object Limits	
Record Types	
Related Lookup Filters	
Search Layouts	
List View Button Layout	
Restriction Rules	
Scoping Rules	
Triggers	
Flow Triggers	
Validation Rules	

Help for this Page

Custom Field Definition Edit   Change Field Type   Save   Cancel

Field Information   ▌ = Required Information

Field Label   Contact number   Data Type   Number
Field Name   Contact_number
Description

Help Text

Data Owner   User ∨
Field Usage   --None-- ∨
Data Sensitivity Level   --None-- ∨
Compliance Categorization   Available   Chosen
                            PII
                            HIPAA
                            GDPR
                            PCI

General Options

Required   ☑ Always require a value in this field in order to save a record
Unique   ☐ Do not allow duplicate values
External ID   ☑ Set this field as the unique record identifier from an external system
AI Prediction ☐ Use this field to store AI prediction scores
Default Value Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: $CustomMetadata.Type__mdt.RecordAPIName.Field__c

Number Options

Length   10
Decimal Places 0

Change Field Type   Save   Cancel

Full Name:

Details	Edit Passport Custom Field
Fields & Relationships	Full Name
Page Layouts	
Lightning Record Pages	
Buttons, Links, and Actions	
Compact Layouts	
Field Sets	
Object Limits	
Record Types	
Related Lookup Filters	
Search Layouts	
List View Button Layout	
Restriction Rules	
Scoping Rules	
Triggers	
Flow Triggers	
Validation Rules	

Help for this Page

Custom Field Definition Edit   Change Field Type   Save   Cancel

Field Information   ▌ = Required Information

Field Label   Full Name   Data Type   Text
Field Name   Full_Name
Description

Help Text

Data Owner   User ∨
Field Usage   --None-- ∨
Data Sensitivity Level   --None-- ∨
Compliance Categorization   Available   Chosen
                            PII
                            HIPAA
                            GDPR
                            PCI

General Options

Required   ☑ Always require a value in this field in order to save a record
Unique   ☐ Do not allow duplicate values
              ○ Treat "ABC" and "abc" as duplicate values (case insensitive)
              ○ Treat "ABC" and "abc" as different values (case sensitive)
External ID   ☑ Set this field as the unique record identifier from an external system
Default Value Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: $CustomMetadata.Type__mdt.RecordAPIName.Field__c

Text Options

Length   10

Change Field Type   Save   Cancel

Passport Number:

Permanent Address:

Creation of Field on Custom object: Visa slot

Select our Object from the selection has visa slot and select option field and Relationship. Select our data type has text and go to the next page and enter the field label has Location and length should be 10 at the bottom of the object you can find options like required, unique, external id select required option so that always require a value in this field in order to save. Go to next page click on visible checkbox so that it is visible to all profiles and select

the next option and save it. The visa slot field are created like this type.

Location:

Time:

Passport Number (Master):

Visa slot Number:

Creation of Field on Custom object: Payment

Select our Object from the selection has payment and select option field and Relationship. Select our data type has text and go to the next page and enter the field label has Payment mode and length should be 10 at the bottom of the object you can find options like required, unique, external id select

required option so that always require a value in this field in order to save. Go to next page click on visible checkbox so that it is visible to all profiles and select the next option and save it. The payment field are created like this type.

Payment mode:

Transaction id (Auto Number):

Cancel Transaction:

Visa slot Number(master):

Creation of Field on Custom object: Reschedule

Select our Object from the selection has Reschedule and select option field and Relationship. Select our data type has text and go to the next page and enter the field label has Passport number(master) and length should be 10 at the bottom of the object you can find options like required, unique, external id select required option so that always require a value in this field in order to save. Go to next page click on

visible checkbox so that it is visible to all profiles and select the next option and save it. The reschedule field are created like this type.

Passport Number (Master):

Location:

Time:

Cancel:

3. <u>Creation of Relationship</u>:

Relationship between objects

        To create a Master Detail relationship between Passport and Visa. Select the object manager and select 'visa' object from the list and select fields and relationships and click on new. Select the data type has Master detail relationship and go to the next

page and save it. To create the relationship between payment and visa slot in this type.

Master Detail Relationship between passport and visa slot:

Master Detail Relationship between payment and visa slot:

4. Creation of App:

Navigate to setup and search for app manager. To select an option for a new lightning app. Give the app name has book my visa and upload the picture and click next. Choose the app option as navigation style- standard navigation, support from factors-desktop mobile and select next. And move the objects from available items to selected items. Passport, visa slots, payments, reschedule to selected items. And system admin profile to available items to selected items.

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ⓘ

Book my Visa

* Developer Name ⓘ

Book_my_Visa

Description ⓘ

Enter a description...

App Branding

Image ⓘ   Primary Color Hex Value ⓘ

■ ▼ #0070D2

Clear

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

Book my Visa

← ▦ Lightning App Builder ⚙ App Settings 📄 Pages ⌄ Book my Visa ? Help

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Options

Navigation and Form Factor ⓘ

* Navigation Style

◉ Standard navigation

○ Console navigation

* Supported Form Factors

◉ Desktop and phone

○ Desktop

○ Phone

Setup and Personalization ⓘ

Setup Experience

◉ Setup (full set of Setup options)

○ Service Setup

App Personalization Settings

☐ Disable end user personalization of nav items in this app

☐ Disable temporary tabs for items outside of this app

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

Utility Items (Desktop Only)

Give your users quick access to productivity tools and add background utility items to your app.

Add Utility Item   Utility Bar Alignment ⓘ Default ▾

The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.
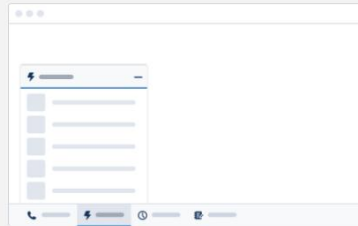
To enable the utility bar for this app, add a utility item.

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items   ↻ Create ▾   **Selected Items**

| 🔍 Type to filter list... |

| Accounts |
| Alert Settings |
| All Sites |
| Alternative Payment Methods |
| App Launcher |
| Appointment Invitations |
| Approval Requests |
| Asset Action Sources |
| Asset Actions |
| Asset State Periods |
| Assets |
| Async Operation Logs |
| Authorization Form |

▶

◀

| Passports |
| Visa slots |
| Reschedules |
| Payments |

▲

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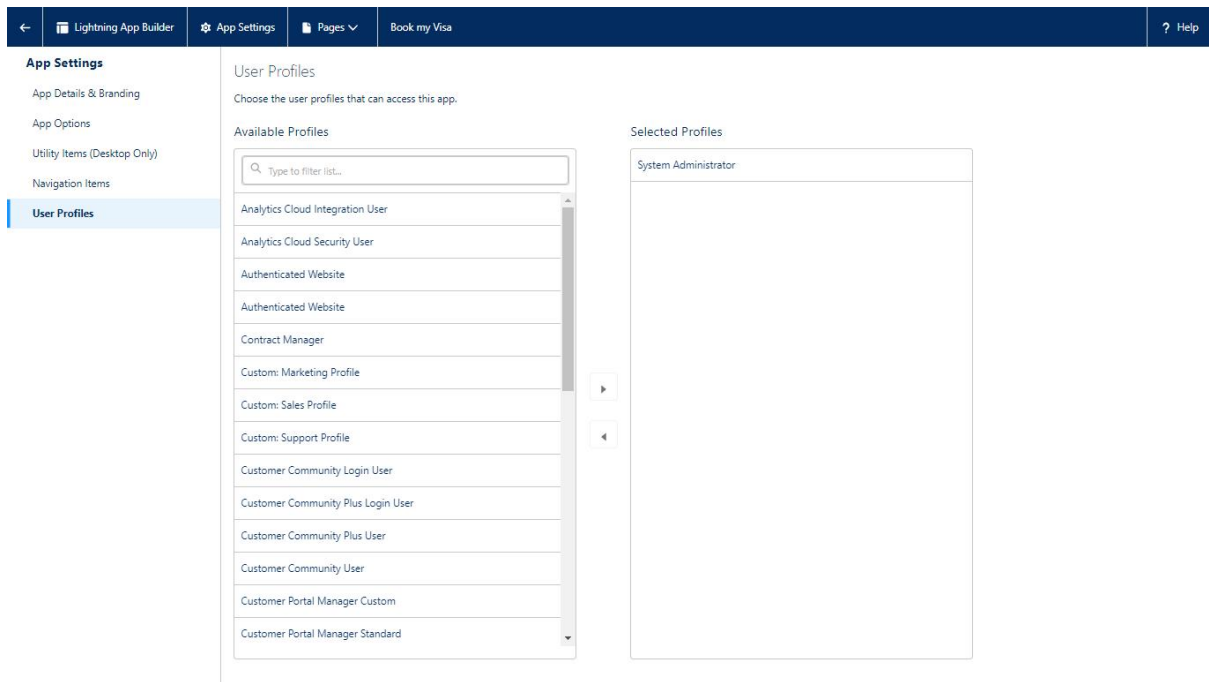
5. Creation of User:

Navigate to setup in quick find search bar, Type user in and select it and click on new user. Give the first name and last name and enter your email in the email field. Enter username; it must be unique. Select the user license of salesforce. In the profile field select standard user. At the bottom of the page check the box to generate a new password and save the page.
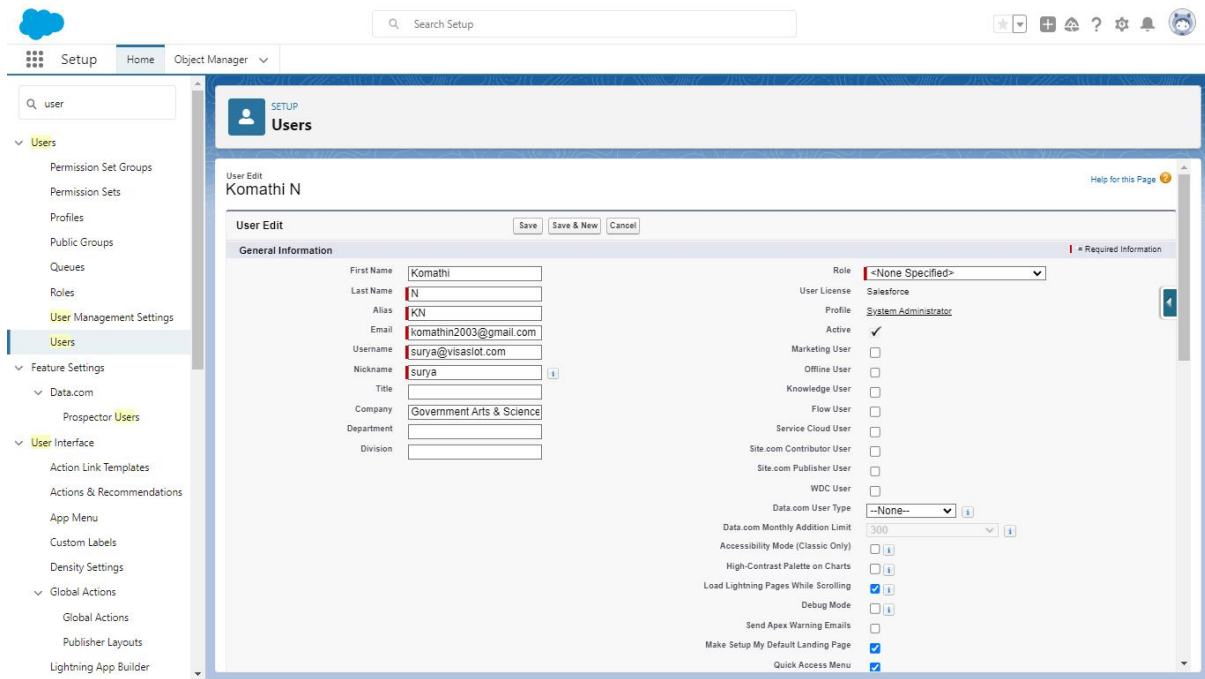
OWD: Organization wide default settings

This can be used to give permissions to the organization wide and it can be used for restrict the access, we can control the record level access.

Go to the setup to find out the sharing setting selected it. Edit the organization – wide Default and Select the passport and change the default external access to Public/Read/write.

6.Create a report:

Click on the app launcher and search for book a visa. Select the report and click new report, select the report type has passport with visa slot with payment and select start report. Left side of the report you can find the outline pane. In the group row select location and group column select passport; passport number to display and add the column select has visa slot number.

Edit the filters as show me select all passport and passport creator date select all time finally save and run it. Go to the edit option and click exports select excel sheets format and click export. We can see the detail in the excel sheets as shown.

7.Create a Dashboard:

Click on the app launcher, search for Book a visa and search for dashboards. Select the new dashboard option. Name the dashboard has a Passport with visa locations. And select create option. Now click

on Add component and for report select passport with locations.

Select the donut chart as selection. Ensure the value is record count and sliced by locations. Click add and save the dashboard.
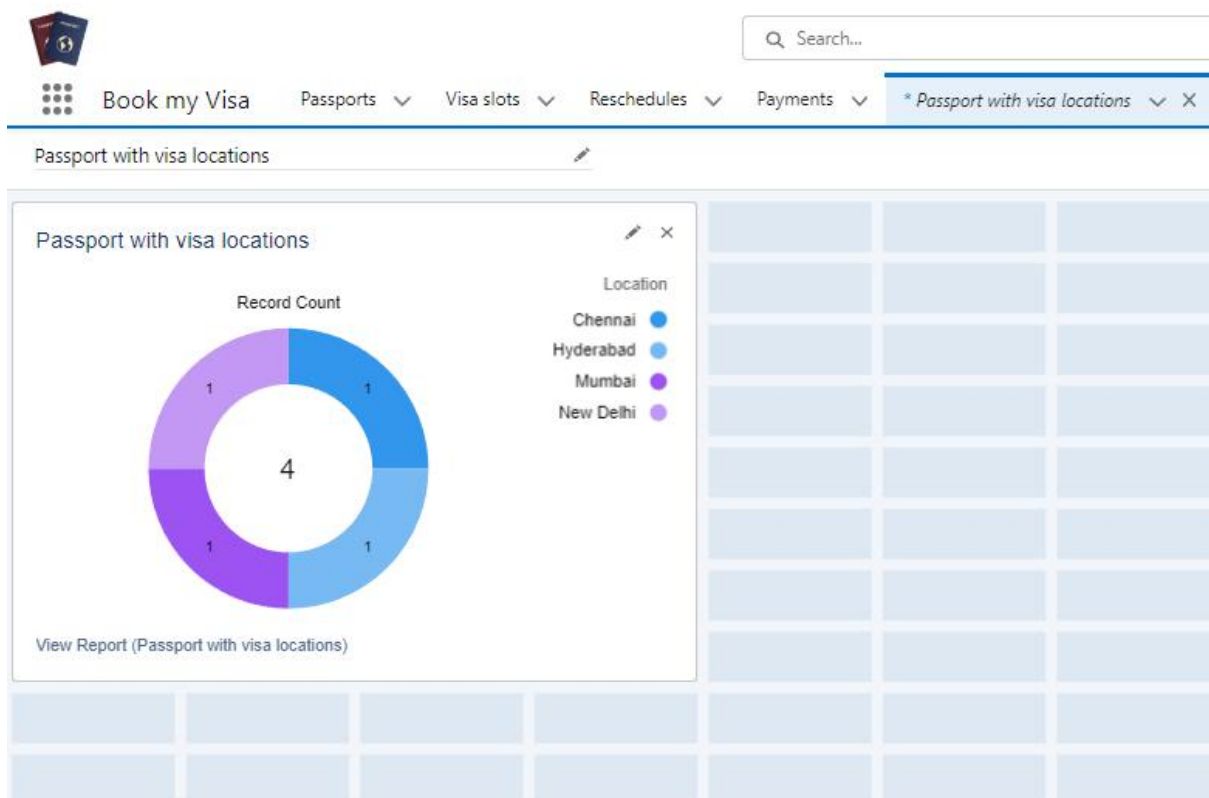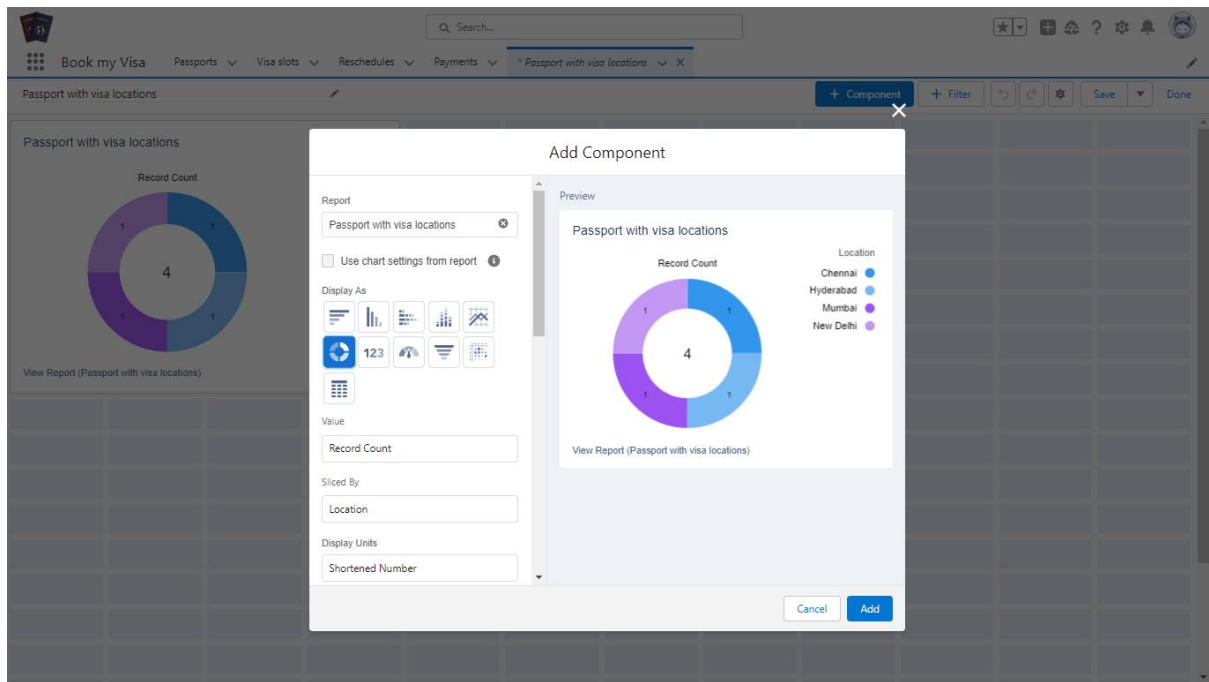
ADVANTAGES AND DISADVANTAGES

Advantages:

➢ Saving time.

➢ Processing is fast.

- ➢ Not much paper work.

- ➢ Easiest way.

- ➢ No wandering.

Disadvantages:

- ➢ Internet connection problem is there.

- ➢ Poor communication.

- ➢ Lack of leadership.

- ➢ Burdensome data entry.

- ➢ Poor connection leads to troubles and anxiety.

- ➢ Can be costly.

APPLICATIONS

This will help you to track and manage the availability of visa slot, which are appointments that are required for certain visa applications.

CRM is a well-conceived business strategy with long terms outcomes the maximize profitability, revenue and customer satisfaction by organizing around customer segment, fostering customer satisfying actions and implementing customer centric process.

CRM is a strategy employed to learn and understand customer need wants and behavior in order to develop stronger and sustained relationship with them.

CONCLUSION

By using the CRM application, we should track and manage the availability of visa slots easily. Booking visa slots will be in an easier way.

It is a beneficial and useful one for the customers. Save the time and often visiting trouble is not there.

FUTURE SCOPE

       In the space of just few years, CRMs have evolved enormously. Approachable and far easier to learn, implement, and pay for, they've morphed from three-letter monsters into ready-set-go software for businesses of all shapes and sizes.

APPENDIX

Team leader   : KOMATHI N – https://trailblazer.me/id/komathi6

Team member: GAYATHRI V – https://trailblazer.me/id/gayuv23

Team member: GOWTHAM R – https://trailblazer.me/id/gowtham17

Team member: KALAISELVI V – https://trailblazer.me/id/kalai20